

Hello everyone and welcome to Comments and Collaboration. This video is focused on how to collaborate with other users currently involved in the review process and other users who may not be currently but who may have input. A quick disclaimer that some specific terms may differ for your location, but the concepts are universal.

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Please remember to download the reference handout using the link below.

Let's get started with a look at how to add comments to a pending policy.

When reviewing a policy, prior to marking approval, you may want to talk it over with others. Outside of PolicyStat, Word documents were probably attached to emails and passed between a group of reviewers. Hopefully all necessary parties were included on each email and the latest version of the document always made its way around properly. PolicyStat seeks to make it significantly easier to collaborate with your colleagues through our collaboration feature.

At the bottom of every pending policy is our Commenting area. Users can add comments, ask questions, or otherwise communicate with other parties involved with the policy. There may be edits you may like to suggest or you may want others to consider a topic not previously discussed. If you're familiar with the way many social media sites like Facebook or the comments section for most online articles work, PolicyStat commenting works much the same way.

When a new comment is made, all users involved with the policy will receive a notification either via email or internal PolicyStat Notification to advise them of the new comment. Other parties involved click the link in the notification to open the policy. When ready, they can reply back to the comment.

Before submitting any comments, you do need to check the box to verify you are aware that any comments made are permanent and become a part of the historical record of the policy. All authorized users will be able to read them and they cannot be removed. We do recommend reviewing comments before adding them to avoid typos and to ensure accuracy.

Comments are permanent but there is a brief window of about 10-15 minutes during which comments can be edited. As long as the pencil icon is present you can edit or modify posted comments. The email notifications will retain the original text, but the historical record will reflect the revisions.

If you would like to gather input from a user who is not currently involved in the approval process for this policy, you can invite them to collaborate. This may be a subject matter expert or other outside party who may not be a part of the standard workflow.

So who can become a collaborator? Any user with a login and password can be invited to collaborate on a policy. This is an important distinction, as, if your facility uses a guest access link to provide access to PolicyStat, any collaborators would need to receive a username and password.

If you are already involved in the review process as an Approver, Owner, Area Manager, or Site Administrator, you are by default able to collaborate and will receive notifications of new comments.

Any newly invited collaborators will receive an email notification that looks like this, that advises them that they have been invited to collaborate and listing the comment in question. To join the discussion, they click the link and sign in to PolicyStat.

General users only have access to search and view the active version of a policy. Collaborators are provided access to view the draft or pending version, depending upon where the discussion may be happening.

If a collaborator (or other user with access) opens the active version that has a pending version available, they will be notified of the Pending version through an alert above the policy's content. They can view the pending version by clicking the button in the message. The same applies if they view a pending version for which a draft version exists.

Collaborators can review comments provided by previous users, and they will be notified of future comments until the policy completes the workflow and is made active.

Collaborators can add new comments to the pending version...

...and invite other collaborators if desired.

However, they are not able to make edits or modifications to the policy. If they have suggested changes, they will need to communicate the changes to an approver or other user with edit permissions to make the changes for them.

Let's review adding outside collaborators to a pending policy.

Below the comments area is a box for adding users and/or user groups. Adding a user group would invite all members of that group at the same time in place of adding them one by one.

Let's add a user... and a user group.

To direct an in-line comment or question towards a specific user, use an @ mention. First, type the @ symbol, then start typing their name. Click their name from the user list or highlight the name and click enter on your keyboard.

Any invited collaborators will be able to collaborate until the Approval process completes. Once the policy becomes active, they would need to be re-invited to collaborate the next time a draft or pending version is created.

That concludes our coverage on Comments and Collaboration in PolicyStat.

Please download the handout for this video using the link below, as it has links to articles which review the information discussed here. At any time, you can also click the Help button in the bottom corner of any screen within PolicyStat and search our Learning Center articles directly. If you don't find what you're looking for, or need additional assistance, click the Contact Us link to generate a new support ticket for our team.

Thanks for being a PolicyStat Customer and thanks for watching.